Creating an IDS Custom Holdings Group in WorldCat Resource Sharing

If your library participates in the IDS Project, you may wish to create an IDS Custom Holdings Group. Custom Holdings is an OCLC ILL feature that allows you to automatically display holding s for groups of preferred lenders.

Creating Groups and Paths
To use Custom Holdings, you must first create Holdings Group records and Holdings Path records.

A Holdings Group record contains the OCLC symbols of preferred lenders for a particular category of borrowing activities, for example, IDS, FREEBKS, LAND, ZERO, LVIS. Each group is identified by a unique name containing from 1-8 alpha-numeric characters.

A Holdings Path record contains the names of Holdings Group records appropriate to a set of requests. Within the Holdings Path record, you list the Holdings Group records in order of borrowing preference. Each Path is identified by a unique name containing from 1-8 alpha-numeric characters.

Custom Holdings groups and paths are created in the FirstSearch Administrative Module:

1. Go to http://firstsearch.oclc.org/admin

2. Log on using your OCLC resource sharing authorization and password.

3. Click the **Resource Sharing** section of the main menu, and then choose **Custom Holdings Groups** from the drop-down list under **Staff ILL Settings** in the sidebar menu.

4. To create a new Holdings Group, click the **New Blank Record** button.

5. Type a group name in the **Group Name** box.

6. Type a group description in the **Group Description** box.

In the **Symbols to be added** box, type the OCLC symbols of the institutions you wish to add. To add multiple symbols, separate each symbol with either a space or comma. Click the **Add Symbols** button.

7. When all symbols have been added, click the **Save Changes** button.

8. Repeat steps 1-8 until all Holdings Groups have been added.

An easy way to create a custom holdings group for IDS libraries (or any other OCLC profiled group) is to use the ILL Policies Directory to retrieve all of the members of an OCLC profiled group. The resulting list is formatted so that it may be pasted into a custom holding group record.

There is a link to the Policies Directory at the upper right corner of the WorldCat Resource Sharing Administrative Module screen:

1. Click the Policies Directory link. A new window will open.

2. To retrieve a list of all IDS participants, go to the Advanced search screen and enter the 4 character code "IDSZ" under the group name. Use quotation marks before and after IDSZ to make the search more accurate.

3. Click **Search**. The search Results Summary screen displays.

4. Click **Display Symbols**. The list of symbols is formatted so that they may be pasted into a Custom Holdings Group record.

5. Highlight the list and select **Copy** from the edit menu.

6. Return to the Administrative Module and go to the Custom Holdings Group screen (see above).

7. Click the **New Blank Record** button.

8. Type a group name in the **Group Name** box.

9. Type a group description in the **Group Description** box.

10. Right click in the **Symbols to be added** box. Select paste from the menu. The OCLC codes for all IDS members will be pasted into your Custom Holding Record.

11. Click **Save Change.**

Creating Custom Holdings Paths

After creating Custom Holdings Groups, the next step is to create a Custom Holdings Paths:

1. Go to http://firstsearch.oclc.org/admin

2. Log on using your OCLC resource sharing authorization and password.

3. Click the **Resource Sharing** section of the main menu, and then choose **Custom Holdings Paths** from the drop-down list under **Staff ILL Settings** in the sidebar menu.

4. To create a new Holdings Path, click the **New Blank Record** button. To edit an existing path, select the pathname from the drop-down list, and click **Go**.

5. Type a path name in the **Path Name** box.

6. Type a path description in the **Path Description** box.

7. Select the groups you want to add from the **Groups available to be included in the path** box by highlighting them. Click the **Add** button. This will move that group to the **Groups chosen to be included in the path** box. If you accidentally add a group, select it and click the **Remove** button to remove it. Groups may be positioned in the path by selecting a group and then using the up and down arrows.

8. When you are finished adding groups, click the **Save Changes** button.

Additional information on Custom Holdings is available on the OCLC Web at:'

http://www.oclc.org/support/documentation/firstsearch/managing/adminref/admin_ref_custom_gen/admin_ref_custom_gen.html

OCLC has also produced a **Custom Holdings tutorial**:

http://www5.oclc.org/downloads/tutorials/firstsearch/rs/customholdings.html

If you have questions about OCLC Custom Holdings, please contact Jon Penn at Nylink: pennj@nylink.org or 800-342-3353.